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TRANSPORTATION IN CANADA 2014



Overview Report

Canada

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Minister of Transport



Ministre des Transports

Ottawa, Canada K1A 0N5

AVR 29 2015
APR 29 2015

His Excellency the Right Honourable David Johnston, C.C., C.M.M., C.O.M., C.D.
Governor General and Commander-in-Chief of Canada
Rideau Hall
1 Sussex Drive
Ottawa, ON K1A 01A

Your Excellency,

It is with great pleasure that I submit *Transportation in Canada, 2014*, the annual report on the state of transportation in Canada. This marks the eighth report prepared as required by the 2007 *Canada Transportation Act*, Section 52.

This report is based on the most current data and information needed to understand the challenges and opportunities facing Canada's transportation system and its stakeholders. It is complemented with an addendum of transportation statistics and figures.

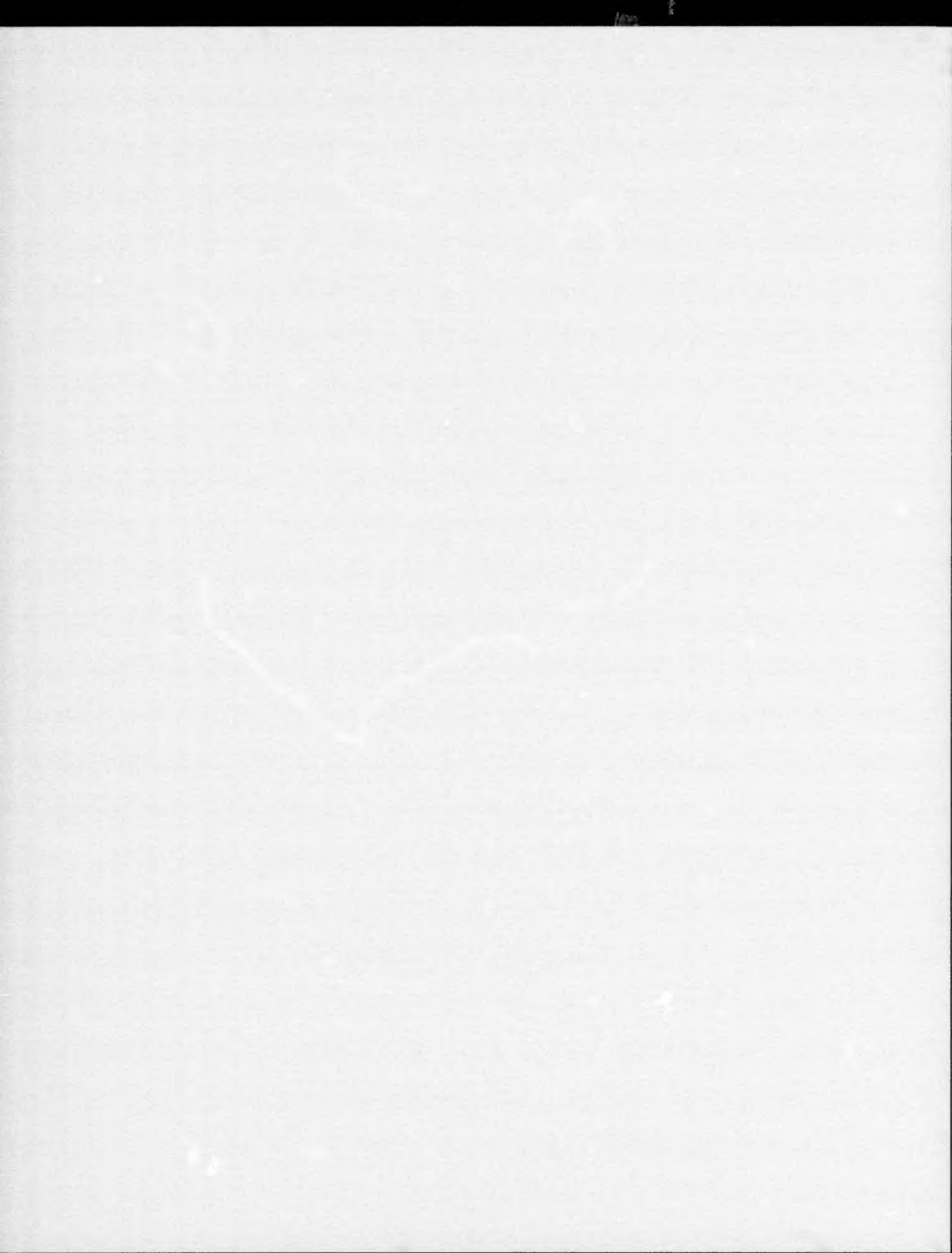
In 2014, transportation continued to play a major role in Canada's economy, creating jobs and enhancing trade, nationally and abroad. More than ever, safety and security have been well established as priorities and therefore, numerous initiatives were put in place in all modes of transportation, particularly for the transportation of dangerous goods and rail safety.

I hope this report will provide you, Members of Parliament, stakeholders and the general public with useful information on the current state of Canada's transportation system and how it shapes the life of every Canadian.

Sincerely,

The Honourable Lisa Raitt, P.C., M.P.
Minister of Transport

Canada



REPORT HIGHLIGHTS

Both domestic and global economic growth contributed positively to the demand for transportation in 2014, even though economic activity at the global level was more modest than expected. Transportation continued to play a key role in all segments of the economy, supporting both domestic and international trade.

Data from 2014 reveal diverging trends between passenger traffic and freight traffic.

On the one hand, modest growth or declines were observed for passenger traffic. Air passenger traffic was up 2.2 per cent between 2013 and 2014, while international cruise ship traffic was down 5 per cent. Rail passenger traffic was down 3.1 per cent within Canada and down 4.2 per cent across the U.S. border.

On the other hand, the value of international freight trade increased for all modes, ranging from a 4.3 per cent increase for the marine sector to a 10.6 per cent increase for trucking. Trends were somewhat different when freight volumes are considered, with rail freight volumes up 6.6 per cent, but air freight volumes down by 3.6 per cent.

In 2012 (the latest year for which data are available), the road transportation sector accounted for 80.3 per cent of transportation-related greenhouse gas (GHG) emissions. Building on existing standards covering model years 2011 to 2016, federal regulations have set stricter GHG emission standards for passenger automobile and light trucks produced in 2017 and beyond. The Government of Canada also announced its intent to further regulate GHG emissions for post-2018 heavy-duty vehicle models, building on regulations in place for model years 2014 to 2018. Voluntary agreements are in place in the air and rail sectors and measures are being implemented in every mode of transportation to encourage GHG emission reduction.

In 2014, a number of initiatives continued to improve safety and security in all modes of transportation. These initiatives range from new baggage screening systems in airports to new regulations and measures to advance safety in the rail industry, in response to Transportation Safety Board recommendations on the accident at Lac-Mégantic. In particular, the latter include new or revised rules related to enhancing the safety of transporting dangerous goods and securing railway equipment.

THE DEMAND FOR TRANSPORTATION

The year 2014 brought improved domestic economic performance, while global economic growth was more moderate than expected. These drivers thus continued to increase the demand for transportation.

National and global economic activity is a key driver of the demand for transportation. In 2014, Canada's real Gross Domestic Product (GDP) growth reached 2.5 per cent compared to 2.0 per cent in 2013, while a moderate economic recovery continued on the global stage. Stronger growth (2.4 per cent) in the United States (U.S.), Canada's main trading partner, was balanced by weaker results in other advanced economies such as Japan and the Euro area. Real GDP growth eased slightly in China, but remained strong at 7.4 per cent.

Continued slow global economic growth and increased crude oil supply, stemming mainly from the U.S., led to a strong decline in crude oil prices in the second half of 2014. The economic impacts of this significant change will become more evident in 2015, and are outside the scope of this report.

Going forward, it is important to go beyond traditional economic drivers when monitoring factors that affect the demand for transportation. For freight transportation, this includes factors such as globalization, shifting supply chains and monetary policy. For passenger transportation, this entails demographic factors such as population aging, urbanization and international migration.

An illustration of the impact of such drivers is the average annual increase of 5.4 per cent in air traffic from Asian countries observed over the past decade, which can be attributed in part to immigration patterns.

TRANSPORTATION'S ROLE IN THE ECONOMY

Transportation continues to play a key role in all segments of the economy. It is an important part of households' and governments' budgets and is critical for domestic and international trade, allowing Canada to compete globally.

Transportation and Gross Domestic Product

In 2014, the transportation and warehousing sector, which makes moving people and freight possible, accounted for 4.2 per cent of GDP (or 3.7 per cent of GDP when excluding pipelines and warehousing). This sector grew by 4.2 per cent in real terms in the past year, nearly double the growth rate for all industries. Air transportation recorded the strongest growth among the four main modes of transportation, with a 9.4 per cent increase.

Expenditures on Transportation

In 2014, aggregate household final consumption expenditures on transportation amounted to \$173.5 billion – second only to shelter, in terms of major spending categories. Excluding government transfers, the combined spending of federal, provincial and territorial governments on transportation was an estimated \$20.8 billion for 2013-14 (the latest year for which data are available), down 1.3 per cent from the previous fiscal year.

Employment in the Transportation Sector

In 2014, 896,000 employees (including self-employed people) worked in the transportation and warehousing sector.

This represents nearly 5 per cent of total employment in Canada, up 1.6 per cent compared to 2013. There were approximately 2.6 unemployed persons for every vacant job in the sector, compared to a ratio of 5.8 for the overall economy.

Transportation and Interprovincial Trade

Transportation provides a vital link for moving and shipping goods within Canada. In 2013 (the latest year for which data are available), interprovincial merchandise trade totaled \$167 billion (current dollars), up 2.5 per cent from 2012. Expressed as a percentage of provincial GDP, the interprovincial merchandise trade varied from highs of 50 and 40 per cent in Nunavut and New Brunswick, respectively, to lows of 14 and 13 per cent in British Columbia (B.C.) and Ontario.

Transportation and International Trade

Transportation is an important element of Canada's trade with other countries. In 2014, total international trade amounted to \$1,036 billion, a 9.3 per cent increase compared to 2013. The U.S. continued to be Canada's top trade partner, with \$680 billion in trade (\$403 billion exported, \$277 billion imported), up 12.3 per cent from 2013.

In addition to the U.S., Canada's top 5 trading partners in 2014 included China, Mexico, the United Kingdom and Japan. The latter four nations accounted for 15.5 per cent of Canada's total international trade in 2014, while the U.S. represented 65.7 per cent.

TRANSPORTATION SYSTEM AND INFRASTRUCTURE

Canada's transportation system makes moving passengers and freight possible. This system includes strategic corridors and transportation infrastructure that provide safe, reliable and efficient links within Canada and to the rest of the world.

In 2014, the Government of Canada launched the 10 year, \$14 billion *New Building Canada Fund*. These funds will support infrastructure of national, regional and local significance that promote economic growth, create jobs and increase productivity. This includes road, rail, port and airport infrastructure.

Map 1 offers a glimpse of the freight transportation flows through Canada's transportation system. It shows Central Canada as an important hub for channeling freight movements. For instance, trucking activity is heavily concentrated along the Quebec-Windsor corridor to move foodstuffs, manufactured and other processed goods. This corridor also represents a key lane for rail trade with the U.S. Corridors of significant railway freight volumes are those transporting bulk commodities like grain, coal, and potash from the Prairie provinces to ports on the west coast. On the return trip eastward, they transport import containers from B.C. ports to Southern Ontario and the U.S.

Vessels use the Great Lakes/St. Lawrence Seaway system predominantly to move bulk materials like grain, iron ore, and aggregates within this system and for the transshipment of exports.

The following sections offer an overview of strategic corridors within this transportation system, and of each of its four components: air, marine, rail and road.

Canada's Strategic Gateways and Trade Corridors

Guided by the *National Policy Framework for Strategic Gateways and Trade Corridors*, the Government of Canada and its public and private sector partners are building a world-class multimodal system connecting exporters and

importers to global markets in order to strengthen international trade. Together, partners have invested an unprecedented \$14.5 billion in strategic transportation infrastructure over a period of 15 years (2001-present).

The Asia-Pacific Gateway and Corridor Initiative (APGCI) is an integrated set of strategic transportation infrastructure investments and policy measures facilitating trade between North America and Asia. The Government of Canada has invested approximately \$1.4 billion to support projects valued at \$3.5 billion, to make the transportation system more reliable, efficient, and competitive.

APGCI projects are helping to improve transportation capacity on Canada's west coast. These investments include a focus on B.C.'s Lower Mainland, road and rail connections stretching across Western Canada and south to the U.S., key border crossings and major Canadian ports.

In 2014, \$99 billion worth of exports (excluding pipeline exports to the U.S.) were shipped through Canada's Asia-Pacific Gateway, up 8.7 per cent from 2013. Around \$52 billion went to the U.S. while \$47 billion went to overseas countries. The latter also includes \$35 billion in exports to Asia, providing access to new markets – an important objective of the APGCI.

Transportation stakeholders faced a number of challenges when moving goods across the North American supply-chain in 2014. A severe port labour strike in the U.S. resulted in cargo diversion, contributing to increased volumes and more congestion at Canadian ports. Other factors such as the weather and a reduced supply of railcars resulted in container dwell times at B.C. ports increasing to 4.3 days in 2014 compared to 2.9 days in 2013.

The Atlantic Gateway and Trade Corridor

Strategy is a collaborative partnership between the Government of Canada and the four Atlantic provinces - Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador. The Atlantic Gateway promotes the movement of international trade, through reliable and efficient access to North America from Asian markets via the Suez Canal, Europe, the Caribbean and Latin America.

Almost \$30 billion worth of merchandise was shipped through Atlantic Canada in 2014, up 7.5 per cent from 2013. Around \$20.2 billion went to the U.S.; \$9.3 billion went to overseas countries.

The Ontario-Quebec Continental Gateway and Trade Corridor is an initiative of the Governments of Canada, Ontario and Quebec, with the support of the private sector. The goal is to continue to build upon Ontario and Quebec's transportation system so it remains a key driver of international trade and economic growth. The collective focus is to develop a sustainable, secure and efficient multimodal transportation system that promotes international trade with North American markets through expansive connections into the U.S., and moves goods to and from Europe and the rest of the world.

In 2014, the value of merchandise shipments moved through Ontario and Quebec totaled \$290 billion (excluding pipeline exports to the U.S.), up 9.5 per cent from 2013. The U.S. was the main market (\$225 billion), followed by West European countries (\$35 billion) and Asian countries (\$14 billion).

Many of the same factors that affected the movement of goods at west coast ports also had an impact in other parts of the country. For example, container dwell times at the Port of Montréal averaged 2.6 days in 2014 compared to 2.0 days in 2013.

Airport System

The Canadian Airport System moves passengers and freight across the country and around the world. It includes:

- 26 airports, shown on Map 2, forming the National Airport System (NAS):

▪ Calgary	▪ Prince George
▪ Charlottetown	▪ Québec
▪ Edmonton	▪ Regina
▪ Fredericton	▪ Saint John
▪ Gander	▪ Saskatoon
▪ Halifax	▪ St. John's
▪ Iqaluit	▪ Thunder Bay
▪ Kelowna	▪ Toronto
▪ London	▪ Vancouver
▪ Moncton	▪ Victoria
▪ Montréal/Trudeau	▪ Whitehorse
▪ Montréal/Mirabel	▪ Winnipeg
▪ Ottawa	▪ Yellowknife
- 71 regional and local airports serving scheduled passenger traffic;
- 31 small and satellite airports without scheduled passenger services;
- 13 remote airports providing the only reliable year-round transportation link to isolated communities; and
- 11 Arctic airports (including the three territorial capital airports counted already in the NAS).

In addition, the Canada Flight Supplement and the Canada Water Aerodrome Supplement listed 1,923 certified and registered sites in 2014, divided into four categories:

- 345 water bases for float and ski planes;
- 378 heliports for helicopters;
- 1,192 land airports for fixed-wing aircraft; and
- 8 other sites.

NAV Canada is a privately run, not-for-profit corporation that owns and operates Canada's civil air navigation system. It operates air traffic control towers at 42 airports and flight service stations at 56 airports.

Amendments have been made to the *Aeronautics Act* to improve the efficiency and transparency of aerodrome construction and operations in Canada. The amendments relate to the need for responsible development of aerodromes. These changes will result in greater public awareness and community engagement in aerodrome construction projects.

Marine Infrastructure

The Canadian Port System

Ports and harbours offer vital connections to promote domestic and international economic activity. As of December 2014, there were 567 port facilities, 902 fishing harbours and 202 recreational harbours in Canada.

Specifically, three categories of ports fall under the National Marine Policy:

- 18 independently managed Canada Port Authorities (CPAs), shown on Map 3:
 - Belledune
 - Halifax
 - Hamilton
 - Montréal
 - Nanaimo
 - Oshawa
 - Port Alberni
 - Prince Rupert
 - Québec
 - Saguenay
 - Saint John
 - Sept-Îles
 - St. John's
 - Thunder Bay
 - Toronto
 - Trois-Rivières
 - Vancouver (Fraser)
 - Windsor
- 29 regional/local ports; and
- 21 remote ports remaining under Transport Canada control.¹

The Great Lakes/St. Lawrence Seaway System

As shown on Map 3, the Great Lakes/St. Lawrence Seaway system provides a strategic waterway system into the North American heartland that includes:

- The waterway between Lake Erie and the Port of Montréal (the St. Lawrence Seaway), with eight locks in the Welland Canal and seven locks between Montréal and Lake Ontario. This portion of the system (including five of the seven locks between Montréal and Lake Ontario) is managed by the Canadian St. Lawrence Seaway Management Corporation.
- The two remaining locks in the Montréal – Lake Ontario segment are in U.S. waters and are managed by the U.S. Saint Lawrence Seaway Development Corporation.

The Great Lakes/St. Lawrence Seaway system serves 15 major international ports and 50 regional ports that connect to more than 40 provincial or interstate highways and 30 railway lines.

¹ As of December 2014, a total of 499 of the 549 Transport Canada port facilities across Canada had been transferred, demolished or had their public harbour status terminated.

Rail System

As illustrated on Map 3, the Canadian Rail System currently has 45,742 route-kilometres (km) of track:

- Canadian National (CN) owns 49.2 per cent (22,517 km);
- Canadian Pacific (CP) owns, 26.1 per cent (11,927 km); and
- Other railways own 24.7 per cent (11,298 km).

The Rail System also includes:

- 19 intermodal terminals operated by either CN or CP to run truck/rail and container intermodal services; and
- 23 rail border crossings with the U.S.

Railway rationalization continued in 2014. In the last 10 years (2005-2014), 2,261 km of track were officially abandoned and 4,699 km transferred, mainly to new shortline rail operators. CN has acquired some track with takeovers of Class II carriers.

VIA Rail operates passenger rail services, mainly over CN and CP track.

Road Network

There are more than 1.3 million two-lane equivalent lane-kilometres² of public road in Canada. Approximately 34 per cent of the road network is paved, while 66 per cent is unpaved. Four provinces – Ontario, Quebec, Saskatchewan, and Alberta – account for over 77 per cent of the total road length.

In 2013 (the latest year for which data are available), the National Highway System (NHS) included over 38,000 lane-kilometres (3 per cent of the road network), of which:

- 73 per cent was classified as Core routes;
- 12 per cent as Feeder routes; and
- 15 per cent as Northern and Remote routes.

As shown on Map 2, the NHS consists mainly of interprovincial and international road linkages. In 2012 (the latest year for which data are available), the NHS accounted for nearly 40 per cent of vehicle-kilometers travelled.

2 A lane-kilometre measures the number of traffic-lanes on each section of road.

AIR TRANSPORTATION SECTOR

Passenger traffic at Canadian airports continued to grow in 2014. While freight loaded and unloaded decreased in terms of tonnage, the value of international air cargo trade grew by 4.4 per cent. The year 2014 recorded the lowest number of fatalities in the air transportation sector in the past two decades.

Industry Structure

In December 2014, 647 Canadian air carriers were holding 1,336 licenses to operate domestic and international air services.

In 2014, a total of 6.2 million aircraft movements occurred at airports, of which 3.6 million were made by airlines, while 2.6 million were itinerant and local movements made by general aviation companies.³

In the last 15 years, Canada saw the exit of many low-cost carriers in a series of bankruptcies. The market stabilised and other carriers showed healthy growth, leading several airlines to expand in recent years.

Air Canada

In 2014, Air Canada and Air Canada Express⁴ accounted for nearly 55 per cent of available seat-kilometres in the domestic air market, the same percentage held since 2011.

Air Canada, Air Canada Express, and Air Canada rouge operated on average 1,544 scheduled flights per day. They have three hubs (Toronto, Montréal and Vancouver) and provided scheduled passenger services to 61 Canadian destinations, 51 U.S. destinations and 74 other foreign destinations on five continents.

As of December 2014, Air Canada had a fleet of 205 aircraft, while Air Canada Express was using 164 aircraft, and Air Canada rouge operated 28 aircraft.

WestJet

In 2014, WestJet and WestJet Encore accounted for nearly 36 per cent of available seat-kilometres in the domestic air market, the same percentage held in 2013.

WestJet and WestJet Encore operated on average 533 scheduled flights per day. They provided scheduled passenger services to 36 Canadian destinations, 22 U.S. destinations and 31 destinations in the Caribbean and Mexico. In November 2014, WestJet had a fleet of 125 aircraft, while WestJet Encore recorded a fleet of 16.

Other carriers

In 2014, Porter Airlines, a regional carrier based at Toronto's Billy Bishop airport, used a fleet of 26 turboprop aircraft to provide direct, non-stop scheduled passenger services to 14 destinations in Canada and six in the U.S.

Air Transat was the largest leisure carrier in Canada for 2014, with a fleet of 17 to 25 aircraft (depending on the season) serving over 70 international destinations in 30 countries.

Foreign operators offered 13.0 million scheduled seats from Canada on an average of 337 flights per day. This is an increase of 2.7 per cent from the 12.6 million seats offered in 2013.

As of December 2014, Canada had air transport agreements or arrangements covering 115 countries. In 2014 alone, Canada concluded a number of new and expanded air transport agreements with bilateral partners. For instance, Canada expanded its agreement with the Philippines, which is our largest air travel market in Southeast Asia. In addition, Canada signed previously-negotiated expanded agreements with Mexico and China, as well as an Open Skies-type agreement with Korea.

³ General aviation includes the following sectors: other commercial, private, and government (civil and military).

⁴ Air Canada Express is comprised of Chorus (Jazz), Sky Regional, Exploits Valley Air Services and Air Georgian.

Passenger Traffic

In 2014, an estimated 124.5 million enplaned and deplaned passengers were reported at Canadian airports, up 2.2 per cent compared to 2013, comprising:

- 75.3 million on domestic services;
- 24.1 million on services between Canada and the U.S.; and
- 25.1 million on other international services.

Between 2004 and 2014, total air passenger traffic grew by 45 per cent, or 4.2 per cent per year on average.

In 2014, around 90 per cent of the total air passenger traffic was handled at the 26 NAS airports. Toronto Pearson International Airport was the busiest airport, with 29 per cent of passenger traffic. Vancouver International followed, with 15 per cent.

Freight Traffic

In 2014, Canadian and foreign air carriers at Canadian airports loaded and unloaded an estimated 1.1 million tonnes of freight, down 3.6 per cent from 2013. The value of Canada's international air cargo trade in 2014 amounted to \$116.4 billion, an increase of 4.4 per cent over 2013.

High-value commodity groups carried by air were mainly machinery and electronic equipment, aircraft material, precious minerals/stone, and pharmaceutical products.

Environment

In 2012 (the latest year for which data are available), domestic aviation emitted 6.1 megatonnes (Mt) of carbon dioxide equivalent (CO₂e), accounting for 3.7 per cent of transportation-related GHG emissions. Over the 2000-2012 period, domestic aviation's GHG emissions decreased by 20.7 per cent despite increased passenger traffic, due mainly to improved aircraft design and operations as well as the introduction of new aircraft. The sector has been improving aviation fuel efficiency through voluntary measures under several signed agreements with the Government of Canada since 2005. The latest agreement (signed in 2012) is Canada's Action Plan to Reduce Greenhouse Gas Emissions from Aviation.

Safety and Security

In 2014, Canada continued to take steps to facilitate the flow of legitimate air travellers and goods while maintaining Canada's high level of aviation security:

- The Canadian Air Transport Security Authority continued to deploy new checked baggage screening systems at Canadian airports with U.S. pre-clearance.
- In December 2014, the Minister of Transport announced the expansion of Trusted Traveller benefits to passengers boarding transborder flights at Calgary, Montréal, Toronto and Vancouver airports.

In 2014, more than 1,500 new and modified aeronautical products built or operated in Canada were certified. The demand for aeronautical product certifications is expected to grow in the coming years as Canada currently ranks third in terms of global civil aircraft production and its production is forecasted to grow twice as fast as the global market during the 2014-2021 period, thanks in large part to its entrance into the large jet market.

Transport Canada and the Civil Aviation Administration of China have been working cooperatively to better understand each others' civil aviation programs in order to facilitate easier movement of aeronautical products between Canada and China. Negotiations towards a Bilateral Aviation Technical Arrangement (BATA) were completed in November 2014. This agreement represents the next step in the evolution of Canada's civil aviation safety relationship with China. The BATA will help streamline the approval process for aeronautical products and eliminate the need for individual technical arrangements.

In 2014, 192 aviation accidents (under Canadian Aviation Regulations) involving Canadian-registered aircraft were recorded, down 17 per cent from 2013. These accidents caused 13 fatalities, the lowest recorded number since 1995. Most accidents involved private and small commercial aircraft.

MARINE TRANSPORTATION SECTOR

More than half of passengers traveling on international cruise ships transited through the port of Vancouver in 2014, with Halifax in second place. International waterborne trade value was up by 4.3 per cent in 2014.

Industry Structure

Canadian flag vessels are active in the domestic and coasting trades (carrying on average 98 per cent of those trades) as well as in transborder trade between Canada and the U.S.

Canadian shippers rely on foreign-based carriers for most international marine movements. Canadian-flagged vessels only carried about 0.1 per cent of Canada's international (non-U.S.) marine traffic in 2011 (the latest year for which data are available).

A number of Canadian-based companies are active in Canadian international trade using foreign-flag vessels. The main ones are Fednav Ltd., Canmar, Cast North America, and Kent Line.

Two geographical sectors serve domestic shipping:

The Pacific coast

This sector serves the Fraser River and Burrard Inlet, coastal routes within the Gulf Islands, the Strait of Juan de Fuca and the Inside Passage from Vancouver up to the Alaska Border, and the Queen Charlotte Islands. Major carriers serving this sector include: Cates Tugs, Kingcome Navigation Company, Norsk and Seaspan International (all owned by Washington Marine Group), and Rivtow Marine Ltd. These carriers are also active in transborder trades to the states of Alaska, Oregon and Washington.

The Great Lakes, St. Lawrence, and Atlantic coast

In this sector, the main carriers, also active in transborder trades, include: Algoma Central Corporation, Canada Steamship Lines, Groupe Desgagnés Inc., Oceanex (1997) Inc., Rigel Shipping Canada Inc., Seaway Marine Transport, Irving/Kent Line, and Upper Lakes Group Inc.

There are also four distinct marine systems involved in resupplying northern Canadian communities:

- The Athabasca marine resupply system (A. Frame Contracting Ltd.);
- The Mackenzie River and western Arctic system (Northern Transportation Co. Ltd. and Cooper Ltd, Island Tug and Barge);
- The Inside Passage and Yukon system (Washington Group); and
- The Keewatin/Hudson Bay and Eastern Arctic system (Woodward, Nunavut Eastern Arctic Shipping Inc., Nunavut Sealink and Supply Inc., Desgagnés TransArtik/PetroNav).

Ferries in Canada provide an important transportation link for coastal and island communities, as well as for communities separated by rivers or lake crossings where bridges are not warranted. There are ferry operators in most provinces such as Marine Atlantic Inc., Northumberland Ferries Ltd., Société des traversiers du Québec, and BC Ferries in British Columbia.

In 2014, the Canadian registered fleet consisted of 188 vessels⁵ with a total gross tonnage of 2.6 million gross tonnes. The dry bulk carriers formed the backbone of the fleet, with 52 per cent of the gross tonnage and 36 per cent of vessels, followed by tankers and general cargo vessels.

There was also an extensive fleet of 330 tugs and 1,120 barges operating in Canada, mainly on the Pacific coast.

Passenger Traffic

In 2014, international cruise ships carried close to 1.4 million passengers at major Canadian ports, down 5 per cent from 2013, mainly in Vancouver (812,000 passengers) and Halifax (217,000). BC Ferries, one of Canada's largest ferry operators, recorded carrying 6.2 million vehicles and 16.1 million passengers on various routes, nearly the same as in 2013.

Freight Traffic

In 2014, Port Metro Vancouver was Canada's busiest port, handling an estimated 123.5 million tonnes of freight, followed by Montréal, which handled an estimated 30.4 million tonnes.

The value of Canadian international waterborne trade was \$210 billion in 2014, up 4.3 per cent from 2013. In terms of value, the most important commodities carried by water were crude petroleum, gasoline and fuel, and grains and agricultural products.

Environment

In 2012 (the latest year for which data are available), the domestic marine sector emitted 5.8 Mt of CO₂e, or 3.5 per cent of transportation-related GHG emissions. Over the 2000-2012 period, domestic marine GHG emissions increased by 10.3 per cent. The increased use of larger, more efficient vessels during this period was offset by an increase in total tonne-kilometres.

Starting in 2013, Canada adopted a number of measures to reduce GHG emissions from ships, developed via the International Maritime Organization. The Energy Efficiency Design Index requires newly-built vessels engaged in international maritime transportation to meet progressively stricter minimum energy efficiency standards from 2015 onwards. Also, the Ship Energy Efficiency Management Plan requires all ships to monitor their energy efficiency. These measures are expected to reduce sulphur oxide emissions from ships by up to 96 per cent and nitrogen oxide emissions by up to 80 per cent. Other marine-related air pollutants should also continue to decline with the 2013 implementation of the North American Emission Control Area in coastal waters, and the Fleet Averaging Regulatory Regime on the Great Lakes/St. Lawrence Seaway system.

Furthermore, Canadian Authorities and the U.S. Coast Guard have been inspecting the ballast tanks of all vessels heading into the Great Lakes through the Seaway. They found that 99 per cent of vessels were compliant with ballast water regulations.

⁵ 1000 gross tonnage and more.

Safety and Security

While Canada already has an enviable record of safe shipping, Canada has created a world-class tanker safety system. In 2014, the government announced additional measures to improve ship-source oil spill prevention, preparedness and response, and liability and compensation. These include:

- Modernizing Canada's Marine Navigation System to enable more accurate and real-time marine safety information to be shared with mariners to minimize the potential for accidents;
- Tailoring Area Response Planning to a region's particular conditions in four higher-traffic areas (the Straits of Georgia and Juan de Fuca, British Columbia; Bay of Fundy, New Brunswick; Strait of Canso, Nova Scotia; and Gulf of St. Lawrence, Quebec). Best practices from these four areas will be used to refine Area Response Planning and allow the Government of Canada to consider options for implementing this approach in other locations across Canada;
- Supporting scientific research on a range of petroleum products, such as diluted bitumen, and response measures. As well, the federal government is providing up to \$20 million to Ocean Networks Canada's Smart Oceans initiative to transform oceanographic data into navigational information;
- Allowing alternative response measures to expand the toolkit for spill responses by

removing the legislative prohibitions around the use of such measures when there would be a net environmental benefit; and

- Strengthening the "polluter pays" principle by enhancing Canada's Ship-Source Oil Pollution Fund (SOPF). Canada's ship-source oil pollution liability and compensation regime is already based on the polluter pay principle. The SOPF was created in 1973 and funded from a levy imposed on industry. The polluter pay principle would be enhanced by making an unlimited amount of compensation available through the SOPF for clean-up costs and damages from ship-source oil pollution. Should compensation exceed the amount available in the SOPF, the federal government would temporarily supplement the SOPF to ensure that compensation is provided to eligible claimants. Any amounts provided by the Government of Canada would then be recovered from the industry through a modernized levy.

In 2014, there were 262 accidents involving Canadian registered vessels, down 8.4 per cent from 2013. There were also 71 foreign-flag vessel accidents reported in Canadian waters, while there were 50 accidents recorded in 2013. There have been 155 commercial marine fatalities reported in Canada over the 2005-14 period, including 12 in 2014.

In 2014, nine new mid-shore vessels were delivered to the Canadian Coast Guard to improve maritime security by enhancing surveillance capabilities on Canada's coasts.

RAIL TRANSPORTATION SECTOR

Rail passenger traffic continued to decline in 2014, but total rail freight increased in both tonnage and value for international trade. Furthermore, a number of measures were implemented to advance safety in the rail industry.

Industry Structure

Over 40 common carrier railways currently operate in Canada. Four Class I⁶ railways operate nationally:

- CN North America owns CN railway lines in Canada and its three U.S. rail subsidiaries: the Grand Trunk Western Railroad, the Duluth Winnipeg and Pacific Railroad, and the Illinois Central Railroad.
- CP has three U.S. subsidiaries, the Dakota, Minnesota and Eastern, the SOO Line, and the Delaware and Hudson.
- Quebec North Shore and Labrador Railway (QNSL) is a wholly-owned subsidiary of Iron Ore Co. of Canada. It offers freight services between Labrador City, Emeril Junction and Sept-Îles.
- VIA Rail is a Crown corporation established in 1977. It operates the national passenger rail service. Canada-U.S. rail passenger services are provided by AMTRAK (the U.S. national railroad passenger corporation) with VIA Rail.

Other regional and shortline railways fall into one of four categories:

- Regional railways carrying traffic originating almost entirely from mines and forests (e.g. Ontario Northland Railway, Cartier Railway);
- Subsidiaries of U.S. railways: BNSF Railway, CSX Transportation (CSXT), Norfolk Southern (NS);
- Shortline railways forming largely from the use of CN or CP track (e.g. Cape Breton and Central Nova Scotia Railway, Central Western, New Brunswick Southern, Windsor and Hantsport, Southern Rail Co., Ottawa Valley Railway, Goderich and Exeter Railway, Montreal, Maine and Atlantic Railway); and

⁶ In Canada, Class I rail carriers are railway companies that realized gross revenues of at least \$250 million for the provision of rail services in each of the last two calendar years.

- Terminal or switching railways carrying traffic to and from industries located on their lines to the main line railway (e.g. Arnaud Railway, Wabush Railway, Essex Terminal Railway, International Bridge and Terminal Railway, Roberval & Saguenay, Southern Railway of BC).

A number of other Canadian railway companies do not provide rail services. They are either subsidiaries of other rail operators or allow other railways to provide services over their track.

In terms of equipment, Class I railway carriers had a park of close to 3,000 locomotives in 2013 (the latest year for which data are available), with 61,100 freight cars (mainly hopper cars, boxcars, flatcars and gondolas).

Passenger Traffic

VIA Rail's annual passenger traffic decreased to 3.77 million in 2014 (a decline of 3.1 per cent since 2013) after reaching a peak of 4.6 million passengers in 2008.

In 2014, 181,000 Canadian and American citizens used rail carriers to cross Canada/U.S. border points, down 4.2 per cent from 2013.

Freight Traffic

Total rail freight carried in 2014 was estimated at 320.2 million tonnes, up 6.6 per cent from 2013. Most rail freight consisted of bulk commodities.

The number of crude oil rail carload movements increased by approximately 36 per cent in 2014 compared to 2013, reaching around 174,000 carloads (preliminary estimate). Despite the significant increase in the volume of crude oil being moved by rail, crude oil carloads accounted for about 3 per cent of total carloads in 2014.

The railways transported a record 550,000 carloads of grain during the 2013-2014 crop year (August 2013 to July 2014), a 22 per cent increase compared to 2012-2013. So far in 2014-2015 (August to February), there have been almost 350,000 carload movements of grain, a 16 per cent increase compared to the same period in 2013-2014.

In 2014, the value of rail international trade traffic amounted to \$126.2 billion, up 7.3 per cent from 2013. Total rail value included rail exports of \$80.4 billion and imports of \$45.8 billion. The main commodities in terms of export value were automotive products, chemical products, forest and metals. On the import side, automotive products and chemical products were most significant.

Environment

In 2012 (the latest year for which data are available), the rail sector emitted 7.6 Mt of CO₂e or 4.6 per cent of transportation-related GHG emissions. Freight operations accounted for 97 per cent of rail GHG emissions. Despite efficiency improvements, rail GHG emissions in 2012 increased by 15.6 per cent compared to 2000, which can be attributed to significant increases in freight activity.

In 2013, Transport Canada and the Railway Association of Canada renewed a memorandum of understanding to encourage voluntary emission reductions from the Canadian rail sector during 2011-2015.

In addition, Transport Canada and the U.S. Environmental Protection Agency are working with key stakeholders to develop a Canada-U.S. Voluntary Action Plan to Reduce Greenhouse Gas Emissions from Locomotives.

Safety and Security

In 2014, the Government of Canada made a series of regulatory changes to advance safety in the rail industry. For example, it:

- Introduced Railway Operating Certificates and Administrative Monetary Penalties;
- Revised the *Safety Management Systems Regulations*;
- Adopted new requirements in the *Transportation of Dangerous Goods Regulations* for consignors who must now classify petroleum crude oil and petroleum distillates on the basis of samples, to determine whether they are suitable and representative of the dangerous goods present in the means of containment during transportation;
- Adopted other new requirements in the *Transportation of Dangerous Goods Regulations* updating means of containment standards, including those for DOT-111 tank cars. Further to this change, Canada introduced a proposal to phase out DOT-111 tank cars and bring in a new class of tank car designed for transporting flammable liquids. Canada also worked closely with the U.S. to harmonize the new tank car standards.

In response to recommendations from the Transportation Safety Board on the accident at Lac-Mégantic, the Transport Minister:

- Issued Ministerial orders requiring railway companies to develop new or revised rules related to enhancing the safety of transporting dangerous goods and securing railway equipment.
- Created an Emergency Response Task Force that brings together stakeholders (e.g. Transport Canada, municipalities, railways, first responders, etc.) in order to strengthen emergency response capacity across the country with respect to incidents involving flammable liquids.

In 2014, there were 1,221 recorded railway accidents, up 14 per cent from 2013. These accidents caused 57 fatalities, 30 per cent less than the average over the last 6 years.

ROAD TRANSPORTATION SECTOR

Road transportation is Canada's largest transportation sector. It continued to exhibit strong growth in trade with the U.S. for 2014. Over the past few years, increased activity has produced higher GHG emissions for this sector, despite greater fuel efficiency.

Industry Structure

As of December 2014, there were 62,805 businesses whose primary activity was trucking transportation. Trucking includes many small for-hire carriers and owner-operators, and some medium and large for-hire companies that operate fleets of trucks and offer logistic services.

Trucking companies were concentrated in four provinces: Ontario (41.6 per cent), Quebec (15.5 per cent), Alberta (15.5 per cent), and B.C. (14.2 per cent).

The trucking industry can be divided into three main types of trucking activities.

- For-hire trucking services, which fall into two main categories:
 - Less-than truckload (LTL); and
 - Truckload (TL).For-hire carriers can be further grouped as:
 - Intraprovincial (i.e., operating exclusively within a provincial jurisdiction); and
 - Extraprovincial (i.e., beyond provincial and national boundaries).
- Courier operators, who specialize in transporting parcels. As of December 2014, there were 11,815 companies with courier services as their main line of business.
- Private carriers, where businesses maintain a fleet of trucks and trailers to carry their own goods. These carriers' activities are not tracked, as they are part of companies whose main line of activity is not trucking (e.g. Walmart, Costco).

Owner operators are independent business people (e.g. drivers) who own or lease their trucks/road tractors and haul goods for either a private (e.g., manufacturer, retailer, wholesaler) or a for-hire carrier.

In 2013 (the latest year for which data are available), more than 23 million road motor vehicles were registered in Canada, up 2.9 per cent from 2012. A majority (92.4 per cent) were vehicles weighing less than 4,500 kilograms (mainly passenger automobiles, pickups, Sport Utility Vehicles (SUV) and minivans), while 4.3 per cent were medium and heavy trucks weighing 4,500 kilograms or more, and 3.3 per cent were other vehicles such as buses, motorcycles and mopeds.

Passenger Traffic

In 2011 (the latest year for which data are available), 15.4 million Canadians commuted to work.

Close to 80 per cent of commuters used a private vehicle to get to work (of whom 83 per cent drove alone and 17 per cent carpooled – in this case referring to having 1 or more passengers in the vehicle). Around 12 per cent used public transit, 7 per cent either walked or rode a bicycle and 1 per cent used a motorcycle/moped or other means.

Public transit use was the highest in four large Canadian cities: Toronto, with 23.3 per cent of commuters, Montréal at 22.2 per cent, Ottawa-Gatineau with 20.1 per cent of commuters, and Vancouver at 19.7 per cent. In 2013 (the latest year for which data are available), public transit systems carried 2.05 billion passengers, an increase of 1.1 per cent over 2012.

Freight Traffic

In 2013 (the latest year for which data are available), for-hire trucking traffic amounted to 251.4 billion tonne-kilometres, up 4.1 per cent from 2012. Around 43 per cent of that traffic involved an international movement.

In 2014, around 10.7 million two-way trucking movements were recorded at Canada/U.S. border points, similar to the traffic observed in 2013. Over 66 per cent of these movements were related to Canadian registered trucks.

The value of trucking traffic between Canada and the U.S. totaled \$371 billion in 2014 (\$179 billion for exports and \$192 billion for imports), up 10.6 per cent from 2013. The same commodities dominated both exports and imports: automotive products, machinery and electrical equipment, other manufactured products, and agricultural products.

Environment

In 2012 (the latest year for which data are available), the road transportation sector emitted 132.7 Mt of CO₂e, or 80.3 per cent of transportation-related GHG emissions and 19 per cent of total Canadian GHG emissions.

From 2000 to 2012, road transportation GHG emissions grew by 12.0 per cent. This increase can be attributed to growth in passenger and freight activity; a shift of activity towards more GHG intensive modes of transportation (i.e., larger vehicles such as SUV and more powerful engines); and a continuing predominance of carbon intensive fuels.

GHG emissions continued to grow despite significant improvements in fuel efficiency. GHG emissions from heavy-duty vehicles (on-road freight) increased by 33.9 per cent between 2000 and 2012, from 35 to 46 Mt. Over the same period, road freight activity, measured in tonne-kilometres, increased by around 36 per cent.

GHG emissions from on-road passenger activity increased by 3 per cent between 2000 and 2012, from 84 to 86 Mt.

Federal regulations have established progressively stricter GHG emission standards for passenger automobile and light trucks of model years 2017 and beyond, building on the existing standards covering model years 2011 to 2016.

In 2014, the Government of Canada announced its intent to further regulate GHG emissions for post-2018 model year heavy-duty vehicles and engines, building on the first ever regulations covering model years 2014 to 2018.

Safety and Security

In 2014, the Government of Canada amended the *Motor Vehicle Safety Act* to further strengthen Canada's vehicle safety regime. These amendments included doubling criminal financial penalties and giving the Minister of Transport the authority to order vehicle manufacturers to issue notices of defect or non-compliance. This will help ensure Canadians are informed of any safety or non-compliance issues with their vehicles.

In 2013, Canada upgraded the *Motor Vehicle Tire Safety Regulations* with stricter tire safety standards, aligning its tire safety regulations with the U.S. to create efficiencies and reduce costs for manufacturers and consumers.

Over the last 10 years (2004-2013, 2013 being the latest year for which data are available), road casualty collisions⁷ decreased by 17 per cent, although more vehicles were on the road. The fatality rate⁸ decreased from 1.4 to 0.8 over that period.

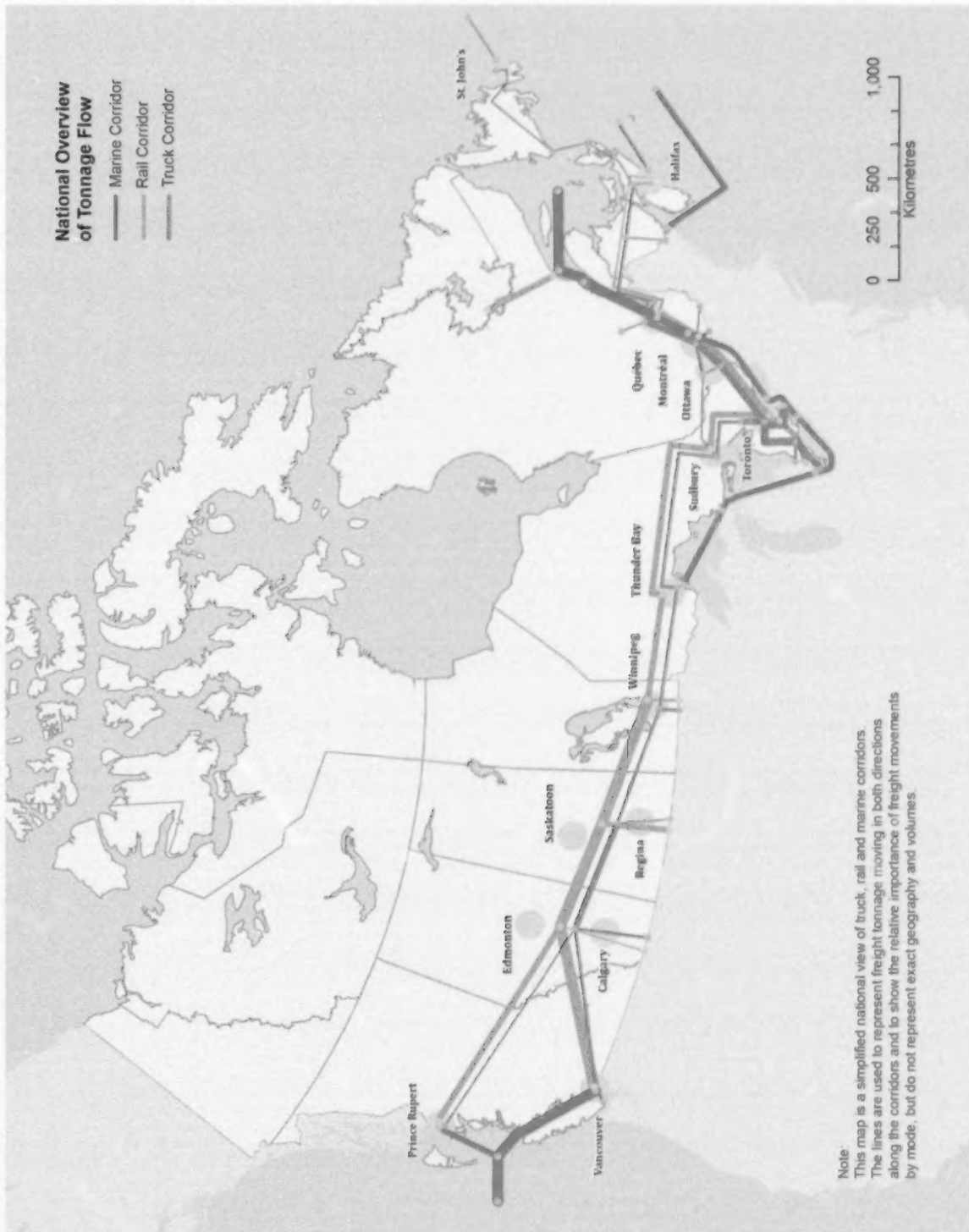
In 2014, manufacturers issued 592 recalls affecting a total of 8.18 million vehicles, tires and child car seats in Canada.

7 Collisions with fatalities and injuries.

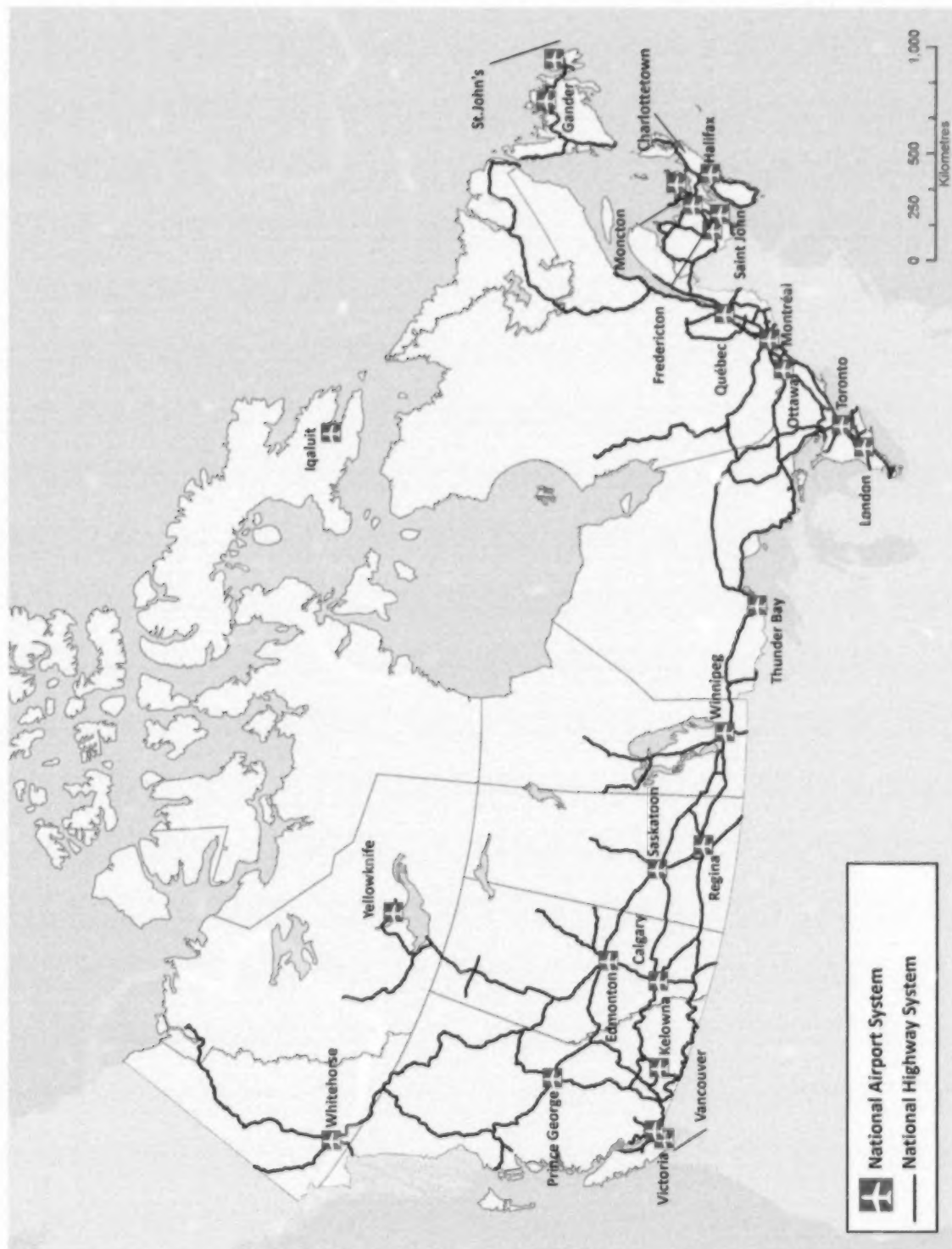
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ANNEX A: CARTOGRAPHY

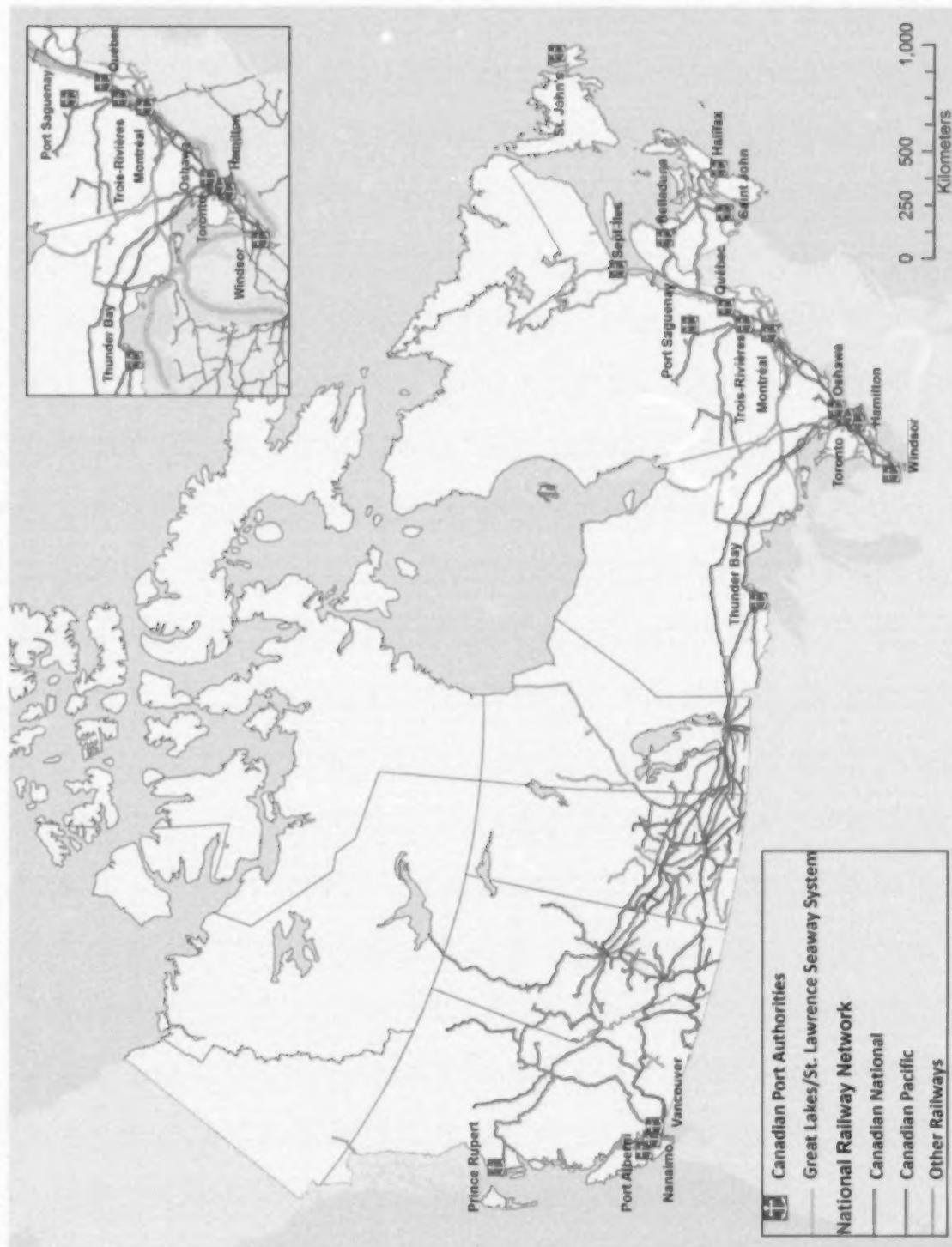
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